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ABSTRACT

A questionnaire survey provided data for this study of current ministry guidelines usage in Ontario. The study reveals that while guidelines have frequently been ignored in the past, most school boards are taking current guidelines more seriously. Local curriculum committees have been largely ineffective in implementing and refining ministry guidelines due to lack of committee preparation time, technical skill, subject matter expertise, administrative support, and to naive assumptions about change. However, there has been a recent increase in sophistication in curriculum development leading to a variety of new approaches that include regionally based planning, preprocessing by a board consultant, the levels of congruence plan (focusing on the technical tasks), and the levels of usage approach (emphasizing teacher behavior). The author argues that rather than concentrating on new approaches, professionals should reform the ministry guidelines to eliminate ambiguities about objectives. (Author/WD)

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WORKING PAPER NO. 27

# THE INFLUENCE OF GUIDELINES ON LOCAL CURRICULUM PLANNING

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Ontario Institute for Studies in Education

JUNE, 1978

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COMMISSION ON DECLINING SCHOOL ENROLMENTS IN ONTARIO (CODE)

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# THE INFLUENCE OF GUIDELINES ON LOCAL CURRICULUM PLANNING

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*This study reflects the views of the authors and not necessarily those of the Commission or the Ministry of Education.*

## THE INFLUENCE OF GUIDELINES ON LOCAL CURRICULUM PROGRAMMING

### Background

As reported in the companion study, The Scope of Guideline Aims and Objectives, Ministry guidelines of the past quarter century have varied on a number of critical dimensions. One of these is the amount of material they contained that can be directly related to course or lesson planning. The guidelines of the 1950's provided quite detailed topic outlines; in fact, the Intermediate topic outlines of that time might well have served as lesson plans.

Then, in the mid-1960's the Ministry initiated a policy of local curriculum development backed up by guidelines which contrasted sharply with what had gone before. Instead of detailed topic outlines, the new guidelines gave most of their attention to the psychology of the learner, general criteria for programs, some examples of broad areas of emphasis, and lists of resource materials. Probably the most extreme example of this new fashion in guidelines was the 1969 English document, whose fourteen pages were given over to, in order of precedence: (a) pictures and examples of students' writing; (b) an argument against the teaching of grammar, with supporting research references; and (c) miscellaneous bits of advice on the program, numbering some ten paragraphs or so. The thesis was that the principal and his staff could work from such a guideline to produce a school curriculum that was geared to the needs of the students in a particular school.

However, at that time the only systems that were able to respond to the Ministry's invitation to do local curriculum development were the large school boards who had a full complement of subject matter specialists; but what these

groups did (write system-wide curriculum guidelines) was not consistent with the Ministry's view on how local curriculum development should take place. The author's recollection is that the most predominant kind of local curriculum development at that time was the preparation of course outlines, particularly in the core areas (arithmetic and reading); these efforts varied from a mere listing of topics to more sophisticated attempts to partition series of skills (e.g., those which figure into the final attainment of a mastery of reading) into a set of sequential "levels" through which the child should progress.

My impression (based, admittedly, on a recollection of documents read several years ago) was that these curriculum development efforts were not very impressive, and certainly that they showed little evidence of having been illuminated by any theoretical concept or substantial body of research. For while it was common in the prologue to these documents to include a few exhortations based, for example, upon a rather distant knowledge of the Piaget theory (e.g., "learning must be built upon concrete experience"), these exhortations were seldom pursued into actual teaching methodologies. Many of the projects of the "topical type" were simply that--topic outlines--and resembled very much the table of contents of the textbooks in use at that time. And even the more sophisticated "levels" approaches did not quite make it all the way to behavioral description, although they aspired to do so, nor did they typically advance any substantial rationale for the particular sequence that they proposed, or attempt to validate its claims over that of a competing levels program, or, in general, show any awareness that there might be empirical or theoretical issues in the construction of such a program. Methodology, where it was described at all, seemed mainly to be a rehash of the better respected current teaching practices.

For a long time, the Ministry took no specific action against what might well have been construed as "illegal" curriculum development projects (i.e., directly opposed to Ministerial policy that the individual teacher and school staff should be the basic curriculum building unit), possibly because it was preoccupied with the problems emerging from the formation of the larger school boards. And after these larger units were formed, their initial efforts were directed toward consolidating order within the administrative hierarchy, establishing a uniform basis of finance within their jurisdiction, and equalizing the gross differences in peripheral services that had characterized municipalities prior to amalgamation. Meanwhile, the larger school boards that were relatively unaffected by the reorganization continued to develop their own curriculum guidelines; by the end of the 1960's, the notion was abroad that these boards had no need (use for) the Ministry's curriculum department, and it was obvious that many teachers in these jurisdictions had not even heard of (let alone used) the Ministry's official curriculum guide for the primary and junior grades ($P_1J_1$). This innocence of Ministerial doctrine was possible because the regional consultants had obligingly taken the position that they would come into schools only on invitation, and in the larger jurisdictions they were seldom invited.

Faced with what amounted to an arrogant disregard for its guidelines on the one hand (the larger boards), and an apparent lack of concern for curriculum reform on the other (newly formed boards), it was evident that the Ministry had to take some sort of action if it wished curriculum development to proceed on an orderly basis in the province. Beginning perhaps in 1971, the message began to come through that the Ministry thought it was time that the newer boards turned their attention to curriculum matters, and the question

of curriculum development became a regular topic at the Regional Council of Education (an association, essentially, of the Directors of Education in a region, convened by the Director of the Ministry office in that region); moreover, in some instances at least, a certain amount of pressure was exerted to have boards name some person to be specifically responsible for curriculum matters. Then, in one of the more memorable events in Ontario education, the then Minister of Education, Mr. Welch, at a meeting to which the Directors of Education were hastily summoned, made it quite clear that (a) the Ministry was the only body in the province which had the authority to issue official guidelines, and (b) that it expected all local school systems to pay attention to these guidelines. It is no doubt significant that in the same speech the Minister pointed out that Directors of Education are accountable to the Minister, and that the question of tenure of Directors was currently under study by the Ministry. Whatever other effects this remarkable speech had, it certainly generated a lot of $P_1J_1$ reading around the province immediately thereafter.

Despite Mr. Welch's admonitions, the larger boards were not content to accept the Ministry's position that the individual teacher and school staff constitute the basic curriculum development unit and, finding new strength through their professional associations, engaged in a sharp series of exchanges with the Ministry on this issue over the next two years. The Ministry, for its part, completed the cyclic review of the primary and junior divisions, the intention being to produce an updated version of the old $P_1J_1$, which espoused the same conception of local curriculum development. However, before that document (Education in the Primary and Junior Divisions) was released, the first rumblings of the "back-to-the-basics" movement were heard,

and the Ministry hastily prepared The Formative Years which outlined a set of mandatory objectives of the traditional sort.

How these two documents related to each other, and to the Ministry's position on curriculum development, was the object of much speculation in the period 1975 to 1977. In the preamble to The Formative Years, the Minister indicated that Education in the Primary and Junior Divisions provided a "philosophical basis" for the program in the primary and junior divisions; the popular interpretation at the time was that The Formative Years provided the "what", while Education in the Primary and Junior Divisions provided the "why". Actually this did not make much sense in specific cases; for example, the "what" of mathematics instruction was apparently taken to consist mainly of computational skills and knowledge of the properties of numbers, while the "why" was a conception of mathematics as "model building". Clearly, these two statements did not have the postulated relationship and constituted, in fact, competing views of the nature of mathematics.

The Formative Years also contained a section entitled "Ontario's Approach to Curriculum" which apparently was an attempt to attain some kind of compromise between the Ministry's extreme decentralization policies and the demands of large boards that guidelines be prepared at the board level by the consultants they had hired for that purpose. This statement has been the object of much exegesis as "centralists" and "decentralists" have tried to argue their positions from it.

The statement begins with what appears to be a concession to centralization:

> Thus, while the Ministry articulates the broad goals, it is the responsibility of the local school boards--through their supervisory officials--to formulate local programs that are within the rationale of the provincial policy and at the same time reflect local needs and priorities. (p. 2)

But then in the next paragraph, it reiterates a theme that was familiar in the decentralization days:

> School staffs, both as individual teachers and as a collective body under the leadership of the principal, have the task of planning classroom programs specifically adapted to the children for whom they are responsible. (p. 2)

After some generalities, the statement swings back to an apparent legitimization of central activities.

> In many jurisdictions, committees define aims and set priorities in terms of community expectations. They identify local resources, refine perceptions that might affect the general sequencing of instruction, and provide, as temporary assistance for less experienced teachers, more or less detailed outlines of work and sample units. (p. 3)

But then in the very next paragraph:

> However extensive this assistance, the major responsibility for planning curriculum rests with the school. Only by accepting this responsibility can it respond to the special needs and characteristics of the children in its care, and work towards achieving the aims of the school and the school system. (p. 3)

As far as the author knows, this was the last sustained Ministry pronouncement on the question of responsibility for local curriculum development.

However confusing the situation, The Formative Years was clearly established as "policy" that had to be attended to. Moreover, there was a discernible effort to encourage Ministry field agents to acquire their supervisory papers at this time; school boards were informed of the change in the status of Ministry field agents, including the re-establishment of their right to enter school systems and individual schools without invitation, and to make reports on what they found; and the central Ministry itself set up an internal group for such evaluation. All of these moves appeared to have unmistakable implications, and boards felt under some duress to begin to take the guidelines seriously.

Consequently, it was reasonable to presume that any action toward this end would be discernible by those who have dealings with local curriculum groups, namely Ministry regional officers and OISE field development staff. It was also our guess that guideline-related activity had to be maintained, if not increased in frequency, in respect to the new Intermediate guidelines. To check out these expectations, we undertook a small survey which is reported in the next section.

## Survey of Guideline Use

As indicated, the survey was intended to check out the contention that, unlike the situation in the 1965-75 period, guidelines are now being taken seriously by most school boards. A secondary interest was to try to get some rough notion of the intensity or duration of the interaction between the guideline and local curriculum groups.

The questionnaire and the accompanying letter are shown in Appendix A. Essentially, it asked regional Ministry curriculum personnel and OISE field officers to rate the guideline usage in evidence in the boards with which they were familiar on the following scale:

(1) guidelines ignored, skimmed or shelved;

(2) use of broad scope of guideline objectives to justify an existing program or special curriculum project;

(3) token, or one-shot study;

(4) intensive use of guidelines in a particular (usually introductory) phase of a committee's or staff's curriculum development work in a particular subject area;

(5) systematic use of guidelines in developing a program.

Each of these "levels" was exemplified with two or more examples, and criteria for classification were provided.

All six of the Ministry offices responded, although one was not able to provide data, as well as five of the eight OISE Field Centres.

A summary of the results is shown in Figure 1. Although the data are rough (some of the respondents admitted that they were providing estimates), the following conclusions seemed justified:

(1) Both $P_1J_1$ and the new Intermediate guidelines are receiving fairly intensive study, with more than half of the instances reported being at level 4 (intensive use of guideline in a particular phase) or level 5 (systematic use of guideline in developing a program).

(2) The Intermediate guidelines are receiving more systematic attention than The Formative Years, despite the fact that they have only recently arrived on the curriculum scene. In fact, most of the $P_1J_1$ entries in the "systematic use" category were made by the staff of one large Ministry office, and were not corroborated by the data from the OISE Field Office in that region. Even without correcting these data, it is clear that the most common use of $P_1J_1$ guidelines is at the initial phase of a local curriculum committee's work. And if we were to project our Intermediate data, allowing for further systematic uses to develop as the guidelines receive more exposure, it is a reasonable conjecture that "systematic use" will be the most predominant mode. (In fact, usage is not far from that level now.)

Figure 1

| Level of Guideline Use | Intermediate Guidelines | | | | | | $P_1J_1$ Guidelines | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | OISE Field Centre Data | | Ministry Regional Office Data | | Combined Data | | OISE Field Centre Data | | Ministry Regional Office Data | | Combined Data | |
| | No. | % | No. | % | No. | % | No. | % | No. | % | No. | % |
| 1. Guidelines ignored, skimmed, or shelved | 2 | 4.0 | 9 | 8.4 | 11 | 7.0 | 0 | 0 | 18 | 18.7 | 18 | 14.7 |
| 2. Use of broad scope of guideline objectives to justify an existing program or special curriculum project | 6 | 12.0 | 17 | 16.0 | 23 | 14.7 | 8 | 29.7 | 2 | 2.1 | 10 | 8.1 |
| 3. Token, or one-shot study | 11 | 22.0 | 10 | 9.3 | 21 | 13.4 | 9 | 33.3 | 13 | 13.6 | 22 | 17.9 |
| 4. Intensive use of guidelines in a particular (usually introductory) phase of a committee's or staff's curriculum development work in a particular subject area | 20 | 40.0 | 33 | 30.8 | 53 | 33.7 | 9 | 33.3 | 43 | 44.7 | 52 | 42.3 |
| 5. Systematic use of guideline in developing program | 11 | 22.0 | 38 | 35.4 | 49 | 31.2 | 1 | 3.7 | 20 | 20.9 | 21 | 17.1 |
| TOTALS | 50 | 100.0 | 107 | 99.9 | 157 | 100.0 | 27 | 100.0 | 96 | 100.0 | 123 | 100.1 |

(3) On the whole, OISE field agents were somewhat less sanguine than their Ministry counterparts about usage of $P_1J_1$, although there was close agreement on the use of the Intermediate guidelines.

In summary, it is at least the reasoned judgment of those in a position to know that on the whole, boards are taking guidelines quite seriously.

## Some Emerging Modes of Guideline Usage

Since our study did not ask for details about usage, we are drawing here upon our own experience with consultants in several regions of the province. The cases described below are not intended to be representative in any sense: their purpose is to convey some notion of a progression in the sophistication of plans for guideline use.

### The "Normal Cycle" of Local Curriculum Development

The work of local curriculum committees since 1965 has tended to follow a predictable pattern. It is the author's guess that most of the Intermediate guideline work that was classified under "intensive use in a particular phase" in our study is repeating this basic pattern today.

The cycle begins in a mood of great optimism as a local curriculum committee, usually volunteers plus one or two people who have been "encouraged" by the administration to participate, is given its impressive mandate by the Curriculum Superintendent. In its initial meetings, committee members will wrestle with statements of aims and objectives in the relevant Ministry and board guidelines (which explains the "intensive use" phase). However, unable to deal with these objectives in any productive way, committee members soon

tire of this "philosophical discussion", and want to "get down to work", which means getting down to what they really believe to be the serious work of curriculum development--the preparation of content outlines that fit the general headings provided by the Ministry. If the Ministry document (and some of the new Intermediate documents would qualify) has detailed outlines, it will remain a continuing reference for the committee, so the latter would (in the language of our survey) be using it in a "sustained" fashion. If the guidelines are global in nature, as were those of the late 60's and early 70's, then the committee soon abandons them in favour of variations on the content outlines their members have developed over the years.

By the end of the first ten meetings or so (it will now be getting near the end of the school year), the committee will have typically put together a first draft of its content outline; this may vary, of course, along such dimensions as the degree of specificity, the number of resources listed, and the detail of suggested methodology and evaluation (normally, however, these are quite skimpy). In the last few years, more and more such groups have managed to get summer grants from their boards to "flesh out" and rewrite the preliminary guidelines for teacher use.

In my experience, the events from here on can best be described in terms of "two year committees" as opposed to "three year committees". The two year committees are ready to "disseminate" their documents or to have them "implemented" at the beginning of the second year, and are normally given time in P.D. days for this purpose. A three year committee will be more cautious, and insist on a "pilot" run in which case the material would be tried out in schools and revised at the end of the second year.

Despite variations of the sorts noted, local curriculum committees have had one thing in common: after a year or two has passed, there is rarely any trace left of their work. The guideline has been shelved, or teachers claim that "we are already doing that anyway". Although most local curriculum committees do not stay together long enough to evaluate the long term effects of their work, they apparently have some intuitions about the lack of effect, for preambles to such programs frequently allude to the fact that the chief value of the committee's work has been the "learning experience" it provided for its members.

Several factors have been advanced to explain the rather dismal showing of this kind of activity. These include:

(1) inadequate time: It is part of Ontario's educational folklore that the "Gray Book" was written in one week. Whether this is true or not, administrators and school board members do not think of guideline writing as a long term venture.

(2) inadequate technical skill: This includes not only the ability to discriminate objectives in a precise way, but such related problems as defining expected levels of performance, giving useful advice on methodology for difficult objectives, and providing some insight into evaluation techniques.

(3) lack of subject matter expertise: This could obviously be a problem, particularly beyond the junior grades.

(4) naïve assumptions about change: Particularly, the view that teachers will be motivated to use a guideline which they have no part in developing, nor, in many cases, see any need for.

(5) inadequate administrative support: During the past decade of decentralized Ministry curriculum policy, administrators have been extremely loathe to "lay on" a centrally devised guideline. Consequently, the use of a board-devised guideline has been voluntary, and there usually haven't been that many volunteers.

Our suspicion (apprehension) is that the large proportion of curriculum committees established throughout the province to deal with the new Intermediate guidelines will repeat the traditional cycle, not deal with the problems identified, and suffer the usual fate. However, there has recently been an increase in the sophistication of thinking about local curriculum development, leading to a variety of new approaches intended to overcome the problems identified. Five such approaches are described in the sections that follow.

## Regionally Based Curriculum Development

In a letter received in response to our questionnaire (Appendix B), Peter Evans describes the organization for curriculum development that has been established in the Midnorthern Region (Sudbury). Evidently the Ministry office has convinced boards in the region to collaborate in the preparation of materials for Intermediate guideline implementation. Also some effort at widespread representation, involving even the small boards, has been attempted. One would gather that the approach is an improvement over the traditional local curriculum development cycle in respect to the first problem (limited time), and the third problem (lack of subject matter expertise). It is too early to tell how it will deal with the other three problems, although insofar

as technical skill is concerned, both Ministry and OISE consultants are attached to the committees.

Pre-Processing by a Board Consultant

The Niagara South Board of Education has an approach to History and Geography guideline implementation that is aimed directly at overcoming shortcomings in technical skill. Here the consultant himself undertakes such technical tasks as classifying Ministry objectives, fleshing out objectives in categories that lack sufficient entries, analyzing skill sequences and levels of knowledge, and proposing test items for more novel or complex objectives.

The result of the pre-processing is a resource document of some 60-80 pages that is intended to help the subject area committees with their work. The consultant then convenes and heads the writing group, which works within an overall phased plan (see next section), so that further technical advice is offered during the course of their work. The scheme also has strong administrative support, in that schools will be expected to use whatever documents are produced by the central committee.

Levels of Congruence

This scheme grew out of the Experimental Program in Curriculum Consultancy that was offered in the Northeastern Ontario Region in the past two years. Most of the students in the program were chairmen of local curriculum committees, charged with the responsibility of implementing Intermediate guidelines within the board, or high school vice-principals with similar responsibilities in their own schools. When the guideline finally did appear, the initial Ministry announcement was that they were to be implemented within a year's time.

However, this group of students, now somewhat knowledgeable about the technical side of curriculum development, participated in discussions with local Ministry personnel which culminated in the so-called "Augustine Plan" (Appendix C). This "Levels of Congruence" plan has found a great deal of support throughout the province as well as in the central Ministry itself.

The Levels of Congruence plan focusses primarily on the technical tasks of curriculum development: categorizing objectives; forming comprehensive sets of objectives within the categories; defining levels of performance in respect to comprehensive sets of objectives; and so on. The plan also takes into account teacher time (it was seen as a five year plan), and limitations in subject matter competence (subject matter specialists had a critical role to play in defining the outcome category system to be used). There was also an attempt to get administrative support at both the board and Ministry level; the local Ministry office (in the Northeastern Ontario Region) called for boards to formulate phased implementation plans that would reach at least level 2 congruence. Moreover, it was part of this strategy that the local curriculum superintendent would be responsible to the Ministry for the execution of the plan, and hence would provide support to local curriculum committees who were trying to use it in their own disciplines.

The first round of Levels of Congruence documents concentrated on the elaboration of the technical tasks used to define the phases, but did not specify in any great detail what sort of structures would be created to do the analysis indicated, how and by whom this work would be supervised, and what types of communication networks would be established in relation to the ongoing work. Since all these were dealt with in the Leithwood "Curriculum Management" system, the latter was projected on the original Levels of

Congruence plan, which was then expanded to include missing components.[1] This effort was again a product of the Experimental Program in Curriculum Consultancy.

Levels of Usage Approaches

Another current approach to Intermediate guideline implementation has been built from the work of Hall,[2] Fullan,[3] and others, who have defined implementation in terms of teacher behavior. The Hall group described so-called "levels of usage", a series of hypothesized stages through which teachers move in respect to any innovation. Recently Leithwood has expanded the levels of usage notion[4] by advocating that a guideline be envisaged as having components or dimensions, and that implementation be conceived as a progressive movement from "non-use" to "full use" of each of these hypothesized dimensions. While he has identified twelve "curriculum dimensions" from the research literature, Leithwood himself appears to favour a fairly standard set including: global conceptions; objectives; teaching materials; teaching strategies; and evaluation tools and procedures.

What would constitute "non-use" and "full use" of a particular guideline dimension depends on the conception of growth one brings to bear on the problem. Left to their own devices, local curriculum groups typically think--in respect to the objectives-dimension, for example--that non-use is equivalent to having no knowledge of the objectives, while full use is having complete knowledge of the objectives (of course, there would be various levels of usage between these extremes). Where the Leithwood research group intervenes, somewhat more sophisticated principles of growth are employed; in the implementation of the Leeds-Grenville junior science program, for example, growth along one dimension

is defined in terms of the teachers' understanding of the relationship between outcomes categories. Although it is not necessary that degree of usage be defined in terms of teacher behaviors, all the examples that have appeared so far seem to be dominated by this particular emphasis. To date, most of the applications of this approach have been the implementation of locally developed curriculum units, although there is no reason in principle why this same approach could not be used with Ministry guidelines. Indeed, the same idea has been taken up by groups in other parts of the province, and a Ministry consultant-proposed plan for the implementation of the Intermediate science guideline, based on this principle, is shown in Appendix D.

There has been considerable speculation about the logical relationship between, and the respective merits of, plans for guideline implementation which employ curriculum development tasks on the one hand, and "dimensions of the innovation" on the other. In a recent paper,[5] the present author traces the development and progressive interrelating of these two ideas as it has occurred in the Northeastern Region, and concludes that there is no difference in logic between the two approaches, if a fine enough level of analysis is employed.

In summary, traditional patterns of local curriculum development that involved an initial "fling" at the objectives in a Ministry guideline, and then retreated to content outline writing, are being superseded in some parts of the province by much more sophisticated approaches which come to grips with the obvious deficiencies of these early approaches. It is too early to tell how successful these new approaches will be, and in particular how extensively they can be transferred to situations in which substantial OISE technical help is not available.

The Need for Guideline Reform

The guidelines themselves must be held partly accountable for the failure of local curriculum groups in the past. As the author has indicated in another report,[6] it takes a sophisticated intellectual effort to give a consistent meaning to a set of guideline objectives; most "unaided" local curriculum committees don't have this sophistication, and don't try to make the effort; consequently, what the committee produces may have no vital connection to the general goals which the guideline is trying to espouse.

The levels of congruence approach assumes, in effect, that the guideline is an imperfect device and that local teacher groups have to construct their own category systems, project guidelines objectives on this system to get their meaning, and remove the redundancies and gaps. Again, this can only happen where technical assistance is available, and its need is occasioned by weaknesses in the guidelines themselves.

Finally, the levels of usage approach--particularly in its relative frequency definitions of use--seems to assume that the guideline objectives constitute a complete or coherent set in themselves. So while this approach seems to avoid some of the more demanding technical tasks involved in levels of congruence, it is premised on an assumption about guidelines that is extremely dubious.

Of course, it is absurd that these things should be happening at all. There is really little justification for investing the thousands of hours of professional time that is spent in attempting to disentangle, and take some point of departure from, Ministry documents which are essentially incomprehensible to the vast majority of teachers. In a companion report, we have suggested that a good deal of the ambiguity about objectives could be removed by an

orderly three-stage approach of objectives definition. This is but one of several reforms required before guidelines really warrant the amount of attention they are currently commanding.

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**MEMORANDUM**

**TO:** Field Centre Heads

**FROM:** Floyd Robinson

**RE:** Commission on Declining Enrolments

**DATE:** 1978 02 07

You are undoubtedly aware of the work of the Commission on Declining Enrolments and of the Institute's heavy involvement in it. Michael Connelly is chairman of a Task Force looking at the curriculum implications of this phenomenon, and he has asked a number of Field Development people, including myself, to assist him in gathering relevant data.

One area of interest and concern has to do with the scope of Ministry guideline goals, and with the actual effect of guidelines on local curriculum planning. Michael and I believe that, in view of their extensive involvement with local curriculum committees, Field Development personnel are in an excellent position to offer a data-based opinion on the latter question.

Would you be good enough to complete the attached questionnaire and return it to me as soon as possible? Our expectation is that you can do an adequate job with it in fifteen minutes or less. However, if you should feel inspired to write a detailed treatise on the subject, please do not hesitate to do so.

All contributions, large and small, will be appreciated.

FGR:dk
Enc.

## The Influence of Guidelines on Local Curriculum Planning

### A. Current Intermediate Guidelines

Most boards appear to have either set up new subject area committees (e.g., in geography, history, mathematics) to deal with guideline implementation, or have assigned this responsibility to an existing committee.

Listed below are descriptions of several types of guideline usage by committees.

You are asked to:

(1) read the descriptions

(2) add a brief description of any other type of usage in your area

(3) state the number of committees whose work you are sufficiently familiar with to make the rating called for

(4) estimate the total number of such committees in your area

(5) determine the percentage of the committees with which you are familiar that fit each description of usage, including any types of usage you have added.

(Note: You can mean the collective staff of a Field Centre.)

## B. The Recent $P_1J_1$ Implementation

It is probably true to say that every board has undertaken some kind of $P_1J_1$ implementation. In some instances study groups or committees were established (e.g., a language arts group), in others, guidelines were studied at the school staff level, and in still others, system-wide examination of guidelines was made on professional development days. And, of course, various combinations are possible.

All this makes for messy data. But we still feel it feasible for you to attempt the following:

(1) read the descriptions

(2) add a brief description of any other type of usage in your area

(3) state the number of boards whose professional development implementation activities you are sufficiently familiar with to make the rating called for

(4) state the total number of boards in your area

(5) determine the percentage of boards with which you are familiar that fit each description of usage, including any types of usage you have added.

## Types of Guideline Usage

1. Guidelines ignored, skimmed, or shelved.

2. Use of broad scope of guideline objectives to justify an existing program or special curriculum project.

   Some examples:
   (a) A mathematics committee has developed a program prior to guideline release, seeks corroboration of its emphasis by selecting particular guideline objectives that support it.
   (b) A values education committee uses guideline references to support its claim that time should be allotted to its program.

   Main Criterion: No intention of changing what was already perceived as desirable.

3. Token, or one-shot study.

   Some examples:
   (a) Presentations on P.D. day.
   (b) Study by department or staff.

   Main Criterion: No planned follow-up; any change results from personal initiative.

4. Intensive use of guidelines in a particular (usually introductory) phase of a committee's or staff's curriculum development work in a particular subject area.

   Some examples:
   (a) A geography committee makes a detailed analysis (compilation, rewording, grouping of guideline objectives) in drawing up objectives for its own program.
   (b) Core or mandatory objectives are cross-referenced to existing units, and the latter expanded to deal with currently "uncovered" objectives.

   Main Criterion: The attempt to extract and use all relevant information in a guideline at a particular phase of the committee's/department's/staff's work.

5. Systematic use of guideline in developing program.

   Some examples:
   (a) A science committee writes units based on guideline objectives, suggested topics and teaching approaches.
   (b) A committee uses a guideline at different points in executing a planned change model in a particular discipline.
   (c) School staffs/departments operationalize all guideline program statements and attempt to make existing programs conform to them.

   Main Criterion: Guideline used in most (or all) phases of the curriculum development activity.

| Types of Guideline Usage | INTERMEDIATE GUIDELINE IMPLEMENTATION<br>Number of groups familiar with _____.<br>% of these groups in each named category. | $P_1J_1$ IMPLEMENTATION<br>Number of boards familiar with _____.<br>% of these boards in each named category. |
|---|---|---|
| 1. Guidelines ignored, skimmed, or shelved. | _____% | _____% |
| 2. Use of broad scope of guideline objectives to justify an existing program or special curriculum project. | _____% | _____% |
| 3. Token, or one-shot study. | _____% | _____% |
| 4. Intensive use of guidelines in a particular (usually introductory) phase of a committee's or staff's curriculum development work in a particular subject area. | _____% | _____% |
| 5. Systematic use of guideline in developing program. | _____% | _____% |
| (Others - please describe) 6. _____ | _____% | _____% |
| 7. _____ | _____% | _____% |
| 8. _____ | _____% | _____% |
| | 100% | 100% |

APPENDIX B

# THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION
# L'INSTITUT D'ETUDES PEDAGOGIQUES DE L'ONTARIO

MIDNORTHERN CENTRE

P. J. A. Evans, M.A., Administrative Head
Christine Nash, Ph.D., Project Director

295 Victoria Street,
Sudbury, Ontario
(705) 675-6491

March 2, 1978

To: Floyd Robinson

From: Peter Evans

Re: Your memo concerning Commission on Declining Enrolments

This memorandum is not the treatise you proposed, but an effort to make a little sense of the variety of guideline related activities going on in the Midnorthern region. I have not been able to fill in your return sheet with much success.

Most of my familiarity is with activities concerning the Intermediate Guidelines in the region. My direct involvement in implementation of the primary/junior guidelines has been restricted to my work on the Values Education Study Committee within one school system. Actually, that study group has been identifying materials, interested people and resources and designing additional resources for use right across the system at all grade levels. Contact people have been identified in interested schools and they come regularly to meetings of the study group. This same group arranges occasional professional activity day presentations having to do with values education and provides publicity for values education. Ministry of Education personnel are involved, and a recent past outcome has been the design of the primary/junior support document "from values into laws", stimulated by work in the Values Education Study Group but involving other teachers in the region in its design. It is now a publication of the Ministry of Education.

I could not be at all precise about what guideline teams are at work in the primary and junior divisions in the various boards in the region. I do know that within the Sudbury Board of Education several teams have been at work under that board's resource personnel, occasionally with support of Ministry of Education people. Currently, there are teams at work on Canadian studies, family studies, and physical education. All of the work there can be classified under number 4 in your list. The units, courses, and resources are related very closely to new guidelines. There has been a fair amount of sharing of ideas and resources across the region, but I don't think that, at the primary/junior level, this is conducted on a planned basis.

However, at the Intermediate level, there is a good deal of activity under direction of the Regional Educational Council which consists of the Director or Superintendent of Programme within all the major boards, the Superintendent of Curriculum Services, and myself with regular support from specific personnel within the Ministry of Education Regional Office. Generally, one or more persons

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in the Ministry Regional Office coordinate the needs assessment and the assigning of work to writing teams in the specific subject areas. The Regional Curriculum Council must approve any specific activities as these involve the release of teachers from the various boards to work on writing teams.

Most of the writers come inevitably from the larger boards in the region, but every effort has been made to ensure some participation on the part of the smaller and more remote boards, as a minimum through the carrying of the needs assessment into teachers in those schools.

Last fall, needs assessments were conducted for Intermediate science, geography, and history. The results of the survey were brought to the Regional Curriculum Council and a number of writing teams, currently at work, were approved. The first set of curriculum materials, concerned with geography, was printed and distributed by the Ministry of Education and is being well received. Those materials indicate close attention to guidelines and close attention to the strengths and weaknesses of present school programmes. The point that should be emphasized here is that all systems are acquainted with the work of these committees, and all systems in the region are intended to benefit very directly. I expect the arrangement will be that one board, the Sudbury Board of Education, will print materials as they are developed, and will recover costs through the sale of these to the other boards. In geography particularly, we have the advantage of a man in the Regional Office who is well experienced in the art of translating curriculum guidelines into specific materials for teachers.

English is following now. As the Guideline was released only in January, we postponed needs assessment until teachers in schools would have an opportunity to look closely at it. The needs assessment phase is going on currently with a report scheduled to the Regional Curriculum Council in early April. I expect writing teams will be put to work immediately thereafter in order that the essential support materials be in the schools by the end of the school year or by September at the latest. I am a member of that particular team partly because of my general background and partly because I was involved in writing the original guideline and one of the support documents. Mathematics will probably be added in shortly now that the guideline has been released. As its implementation dates are staggered, movement on that will likely be somewhat slower.

Meantime, within the Sudbury Board, a good deal of activity is taking place with respect to Français and Anglais guidelines. Even though the Anglais guideline has not hit the streets, people from the system as well as myself have been involved in its design, so it is relatively easy for us to assess the needs in the schools. There is a good deal of continuing activity within the Sudbury Board of Education in the design of specific materials, for example, for slower learners.

A year ago a regional team was put together for the writing of support materials for the People of Native Ancestry support document for the primary/junior division. This Centre was active in the design of those materials. I believe that the Ministry proposes to conduct similar work shortly for the Intermediate resource document.

Resource personnel in the region are unequally distributed. Most of them are located in Sudbury. I am pleased to say that there has been some sharing of these with boards to the west of us. We have already been involved with

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presentations introducing the guidelines in the western part of the region and this type of work is likely to continue more intensively.

I hope this will be of some help.

Peter Evans

:tm
Encl.

# INTERMEDIATE DIVISION GEOGRAPHY 1977

## A SUGGESTED PLAN FOR A PHASED IMPLEMENTATION

### Structural Congruence

Phase 1: (a) Courses of study have been developed at the grade levels indicated in the guideline. Insofar as the intermediate division Geography guideline is concerned, this would mean that a decision has been made as to the grade placement of the four main courses (North America and Southern Continents may be taught in either grades 7 or 8, and Canada and Eurasia may be taught either in grades 9 or 10, but the first two courses must appear in the elementary panel, and the second two in the secondary panel).

(b) Each course will be divided into units. Since there are no mandatory units for any of the courses in the intermediate division, one possible unit organization might be that proposed in the guideline itself; for instance, the guideline description of the course on Canada indicates the following as potential units: Canadian Diversity; Where We Live; Locality Studies; Developing our Natural Resources; Agriculture: An Example of Change; Energy; Water; Transportation Bonds; Boundaries; and Canada's Partners. Many schools will be more inclined to use their existing unit structure for the course in question. In any case, this step will be completed when there is available a table indicating the course name and intended units, of the type shown below.

| Grade | 7 | 8 | 9 | 10 |
|---|---|---|---|---|
| Course title | -- | -- | -- | -- |
| Unit names | -- | -- | -- | -- |
| | -- | -- | -- | -- |

As indicated in the guideline (p. 3) the construction of such a table should involve cooperation between the elementary and secondary panels; whether this is done on a family-of-schools or board basis, however, will remain a local option.

(c) Locate mandatory guideline objectives in the existing units. In the Canada course, then, the units in which each of the objectives cited in sections Core Content (p. 23-24) and Skill Development (p. 24-25) are covered would be indicated.

(d) Identify mandatory objectives (from the sections cited above) not covered in the present units, and expand the latter (or devise new units) to cover them.

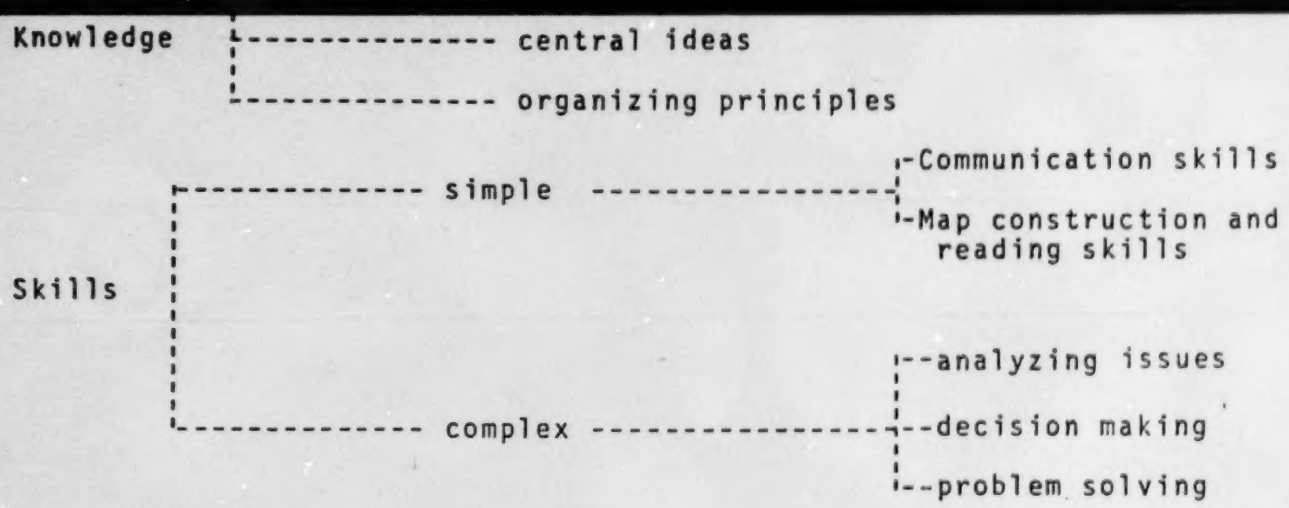
At this point a family of schools responsible for implementing the intermediate Geography guideline would have met the minimal expectations for phase 1. The Ministry's justification in insisting that schools proceed beyond this phase is that the teacher of geography is subject to more general sets of objectives whose implementation also constitutes an integral part of the Ministry philosophy. Such statements are found in the guideline in sections "Aims for the Intermediate Geography Program" (p. 3-4) and "The Nature of Studies in Geography" (p. 40-46). In addition, all programs are subject to the general aims of education for the schools of Ontario, first published in 1974 ("The Goals of Education: Providing an Equal Opportunity for All") and reiterated in several Ministry guidelines thereafter (e.g., The Formative Years and Circular PIJ1). In general, these objectives are much broader in scope than those found in individual course lists, and identify an ideal towards which the Ministry will expect some demonstrable movement over a period of time.

Phase 2: All of phase 1 plus

All major categories and sub-categories of the general Ministry objectives are being taught and evaluated in at least an informal fashion.

(a) All the objectives for the grade and division in question, including the broader sets of objectives alluded above, are organized into categories which make sense to local educators. At least the beginnings of such a category system can be found in the guideline itself. For example, the section on "Planning Units and Course" (p. 4-5) indicates that objectives are to be organized under the general headings of "Knowledge, Attitudes and Skills". On page 40 (in the section on "Knowledge") the guideline suggests that the Knowledge category can be further divided into facts, central ideas and organizing principles. On page 43 the guideline suggests that values as well as attitudes should be considered. It is also clear that the skill objectives the Ministry has in mind vary in complexity. While the Canada course objectives deal mainly with relatively simple mapping skills, later sections of the guideline call for the analysis of issues (p. 43, bottom line), decision making (p. 44, second paragraph) and problem solving (p. 45). Finally, even the "simple skills" are divided into two main categories, "Mapping Skills" and "Communication Skills" (p. 45-46).

What results from this examination of the guideline is a category system for objectives (or learning outcomes) which can be represented as shown below




(b) Locate objectives from the Ministry lists which do not fit into the category system and expand the latter as required. For example, on page 4 we find that "Appreciation of the natural environment" is an objective which describes a consistent pattern of behavior over a period of time. Such behavior is normally designated a "trait", and suggests that a trait category might well be added to the original classification scheme.

(c) In anticipation of phases 5 and 6, review classification schemes employed by curriculum groups in adjacent divisions in the same subject (Geography), and by teachers in related disciplines at the intermediate level (e.g., Science, History). Where feasible, modify the names of the categories and add new components to ensure as much consistency of approach as possible (we must remember here that a grade 8 teacher may have as many as five new guidelines to implement, and the task will prove completely overwhelming unless commonalities are highlighted).

(d) If any major categories or sub-categories are not reflected in the objectives of the existing units modify the latter to include them. For example, many Geography teachers will find it necessary to think about how both values and problem solving are to become objectives of teaching and evaluation in their subjects.

(e) (optional) Determine if there are additional objectives that the local group wishes to pursue that are not found in Ministry guidelines, justification for which action is provided in the guideline on page 4 (third paragraph in "Planning Units and Courses"). As a possible example here, at the present time a small number of subject specialists in the high schools are beginning to make a distinction between "knowledge of the products" and

"knowledge of the process" in their respective disciplines. The geographic facts of the Niagara region are part of geographical knowledge (the product), while information about geographers, their methods of investigations and biases are "knowledge about geography" (the process). Since the guidelines speak mainly about geographical knowledge, a local group who wish to treat "knowledge about geography" systematically would divide their knowledge objectives into two separate columns.

THE FOLLOWING PHASES (3, 4, 5 and 6) ARE A SUGGESTED APPROACH TO CURRICULUM DEVELOPMENT. LOCAL CURRICULUM DEVELOPERS MAY WISH TO FOLLOW THESE OR DECIDE ON A DIFFERENT APPROACH TO CURRICULUM BUILDING.

Objectives Congruence

Phase 3: All of phases 1 and 2 plus

All of the objectives for the division are organized into sets within the categories outlined in the guidelines, or developed locally. All these sets of objectives are being taught and evaluated, at least informally.

Procedure

(a) Take each category or sub-category in the classification scheme developed above in turn and ask: what specific items should be included in this category?

(b) Start with the lists which the Ministry provides for some sub-categories, and improve upon them where required. For example, the skills list for the Canada (p.24) course provides a reasonably comprehensive set of map skills, and a similar set of communication skills is found on page 45-46. Where no Ministry list exists, construct such a set drawing upon current documents from school boards, the professional literature, or the insights of a local curriculum committee. Again, phases 5 and 6 congruence might be anticipated by examining organizing sets in use in related disciplines, or in adjoining division levels in the same discipline.

Two such categories needing elaboration are: "Attitudes" and "Values". The guideline sections dealing with these (pp. 43-44) describe topics and situations through which students might develop values, but do not specify the content of such values (any list of attitudes or values proposed for programming should, however, be limited to those which have unanimous support in the community). Similarly, it is clear that "communication skills" and "mapping skills" do not exhaust the range of skills which must be drawn upon by the geography student.

(c) Review existing programs and add new category items as required.

(By this point all the teachers in a division should have an agreed-upon set of objectives for which they are to provide cumulative growth over the intermediate division. In order to overcome redundancy and overlapping, and to give pedagogy specific focus, it is necessary to define sequences or levels of growth for these objectives).

Objective Levels Congruence

Phase 4: All of phases 1, 2 and 3 plus

The individual elements (e.g., concepts, skills, attitudes) of organizing sets are programmed over the division into increasingly complex levels of performance.

The teaching and evaluation of such concepts, skills, attitudes, etc. are differentiated by grade level and student maturity.

Possible Procedure:

(a) Take a category or sub-category for which the Ministry document provides a continuum of skill, and improve upon it as required. One such sequence can be devised by following the map construction skills listed for each course from grade to grade.

(b) Determine priorities for the unprogrammed categories.

(c) Locate and examine existing sequences for appropriateness and modify as required.

(d) Devise levels for categories for which existing materials are inadequate.

(The full implementation of phase 4 will take some time, although Boards might reasonably be expected to be well into this process by the third year. The task of defining growth schemes is a fairly difficult one, but can draw upon the experiences the teachers will have had with the more comprehensive objectives at phases 2 and 3. For example, at these phases many geography teachers will begin to experiment with attitude development in their courses, so that when the system is ready for phase 4 a backlog of information about sequences of growth and realistic expectations will be available.)

(e) Specify the levels of performance in respect to the division-wide objectives expected by each successive course level. Such "level" objectives can become the object of very precise methodology and evaluation.

Within Discipline Integration

Phase 5: All of phases 1, 2, 3 and 4 plus

The sequences indicated in phase 4 are integrated with those found in other division treatments of the same topics.

Possible Procedure:

(a) Continue and complete the alignment of category systems between divisions (initiated at phase 2).

(b) Continue and complete the alignment of organizing sets of objectives between division levels begun in phase 3.

(c) Continue and complete the alignment of levels of performance for specific objectives begun in phase 4. It will be necessary to repeat this step periodically, since expectations for performance -- particularly in respect to new objectives -- will change progressively as these objectives become the object of systematic teaching and evaluation in earlier grades.

Inter-disciplinary Integration

Phase 6: All of phases 1, 2, 3, 4 and 5 plus

The sequences alluded to in phase 5 are integrated across related disciplines.

(This describes a final stage of integration between disciplines, which could have been initiated at phase 1. At this phase, teachers from related disciplines could contribute to the treatment of a common topic along the lines suggested in the guideline (p. 5). Inter-disciplinary collaboration may itself move through a series of stages beyond this point, and defined by the previous phases. Thus, a second step in integration would be alignment of the outcome categories between disciplines. This could be followed by the alignment of organizing sets (e.g., the use of a common set of simple skills). Finally, there would be an alignment of levels within these strands.)

Thus, while full inter-disciplinary integration could not be expected within the foreseeable future, a set of feasible steps towards that end can be identified as indicated.

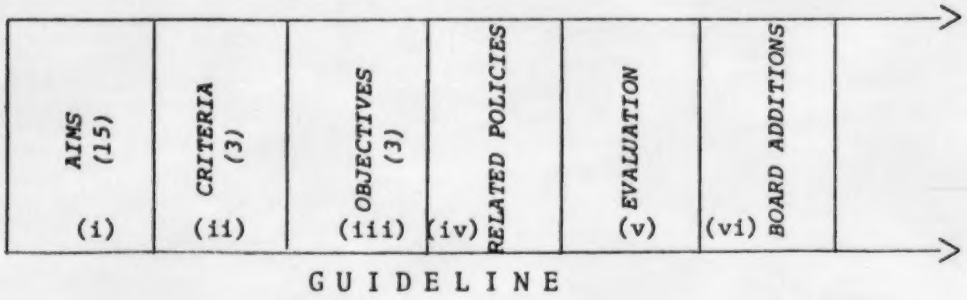
## A PROCEDURE FOR DEVELOPING A PHASED IMPLEMENTATION PLAN

### *DEFINE PHASES*

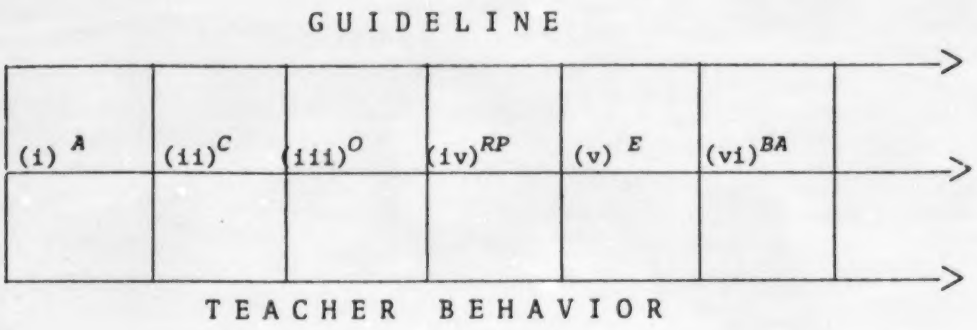
*(INTERMEDIATE SCIENCE 1978)*

A.

1. Determine components of guideline which specify Ministry of Education requirements (Section A and B)



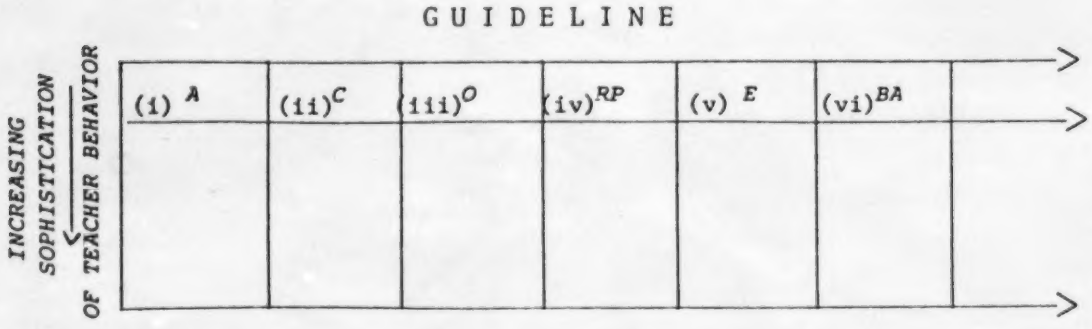

2. Determine categories of teacher behavior in terms of which implementation will be described.




3. Select a principle for growth by which teacher behavior will be described -

   e.g. Levels of Usage
   Levels of Congruence
   (Others)

4. Apply principle selected to define levels of teacher behavior for each category (sequenced).




continued.....

5. Define the phases of implementation in terms of the level of teacher behavior to be attained in each phase -

   e.g. promotion of growth of individual teacher from present level of behavior;

   e.g. common (minimum) expectations for all teachers defined at different points in time.

B. *DEFINE TASKS TO EXECUTE EACH PHASE*

1. Identify criteria for completion of phase (from definition of teacher behavior (A 5).
2. Create the most appropriate organizational structure for achievement of the criteria
3. Identify obstacles to attainment of criteria
4. Identify procedures to overcome obstacles
5. Develop strategies to use procedures with different implicated groups
6. Apply strategy(ies)
7. Determine the degree to which the criteria for completion of a phase have been met - if judged adequate proceed to next phase - if not recycle

C. *DEFINE MANAGEMENT TASKS FOR EACH PHASE*

1. Designate personnel responsible for tasks previously identified (in A 1-5 and B 1-7 inclusive)
2. Designate resources available for each phase (including training, budget, teacher time available)
3. Negotiate timeline for each phase
4. Monitor and modify procedures and strategies

Northeastern Ontario
Science Working Group
1978 03 06